Community Based Services Checklists

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Access Point Checklist

REGISTRATION

☐ Contact BHD Central Registration when a client presents for intake, after reviewing the purpose of the call with clients---414-257-5200.

SCANNING/UPLOADING

☐ Take the client picture and upload it to Avatar
☐ Scan the Insurance Card (Scan to Folder—Insurance Cards/ID) (make sure to select 32 or 64 bit based on your computer settings)
☐ Scan the Driver's License (Scan to Folder—Insurance Cards/ID) (make sure to select 32 or 64 bit based on your computer settings)

REVIEW FINANCIAL INFORMATION

☐ Financial Investigation (this is completed by CR)
☐ Cross Episode Financial Eligibility (this is completed by CR)

CONSENTS

☐ CRA
☐ Informed Consent for Disclosure of Client Information
☐ Consent to Services and Rights Acknowledgement
☐ Informed Consent to Access AODA Treatment

ASSESSMENT FORMS

☐ CARS Intake Bundle—Use the bundle or open the below forms individually
    ☐ Client Contact—Complete as much information as known
    ☐ Emergency Contact
    ☐ CARS Referral Form (Multiple service requests can be added to this form)
☐ CARS Comprehensive Assessment
☐ CARS Assessment Result and Placement—**If eligible** Complete the form for **every** service recommended.
☐ CARS Assessment Result and Placement –**If ineligible** Complete the reason section.
☐ Recovery Support Services Assessment—Complete for individuals who will not receive a Care Management level of care. (MHOP and AODA)
☐ Client Locator Form as applicable

SERVICE AUTHORIZATION

☐ Service Authorization
- Refer to the Avatar Manual for the sections that need to be completed on the Service Authorization Form.
- Refer to the Program/CPT/Unit Crosswalk for Service Codes and Units to enter.

WAITLIST

☐ Wait List Management—Complete the form when applicable

Community Based Services-Checklists

APPOINTMENT REMINDER

☐ CARS Appointment Sheet Report
       ☐ Print a copy for the patient
       ☐ Print and send a copy to the provider

FILE ATTACH

- File attach documents as applicable.
- Documentation that **did not** occur in Avatar will need to be file attached as applicable. ie documents that the client has brought in w/them.
- File Attach the following Avatar Reports as applicable for Providers that do **NOT** have a Care Manager.
- Always print the report as opposed to printing from the Chart View.

☐ CARS Comprehensive Assessment Report   ☐ RSS Assessment Report (Recovery Support Services Assmt)
☐ CARS Assmt Result and Placement Report   ☐ Consent Reports

OTHER

The CARS episode will remain open for 90 days and will be closed by providers and/or CARS after 90 days.

☐ CARS Comprehensive Assessment --**Update** if client returns w/in 90 days or less.

☐ CARS Comprehensive Assessment –**Redo** if client returns after 90 days.

☐ Any time a client returns to the AP, contact CR for the purpose of insurance verification and client demographic and contact information verification.

CCS Checklist

DOCUMENTS/REPORTS FOR REVIEW (Avatar)

☐ CARS Referral Form
☐ Client Contact Information
☐ Emergency Contact
☐ Financial Investigation
☐ CARS Assessment Result and Placement/Report
☐ Physician Prescription (View via Avatar "ProviderConnect File Attach" form)

Chart View-Client View Section
Review the following if the client was admitted to any of the BHD departments.

☐ Individual Progress Notes if applicable   ☐ IP Patient Discharge Instructions Report if applicable
☐ Crisis Discharge Summary Report if applicable (Emergency Dept) ☐ Discharge Medications Report if applicable

CONSENTS

☐ CCS Admission Agreement (Paper)
☐ MH/AODA Functional Screen Consent Form (Paper)

SPECIFIC SERVICE AUTHORIZATION REQUESTS (ProviderConnect)

Enter the auth request in ProviderConnect on the Authorization Tab.
☐ The admission agreement needs to be signed before a request can be made.
☐ Request Auth for Screen and Assessment
☐ Complete the CCS Avatar and paper documentation.
☐ Request Service Planning and Service Facilitation

ASSESSMENT FORMS (Avatar)

☐ CCS Application (Paper)
☐ CARS Comprehensive Assessment
☐ CARS Assessment Summary
☐ Crisis Plan if applicable
☐ PPS/NOMS Supplemental
☐ State of Wisconsin PPS AODA Module
☐ State of Wisconsin PPS Mental Health Module
☐ State of Wisconsin PPS General Information
☐ Print the Avatar Functional Eligibility Screen Report to enter the information in the State Website
☐ Print the State MH/AODA Functional screen results page
☐ Determination of Need Statement (Mental Health Professional)

BILLABLE & NON-BILLABLE SERVICES (ProviderConnect)

Enter billable and non-billable services and case notes.
☐ Treatment Tab

IRP (Avatar)

☐ Individual Recovery Plan

DOCUMENTS TO FILE ATTACH (Avatar)

File attach the following via the Avatar "ProviderConnect File Attach" form. Use the Authorization Option.
☐ CCS Admission Agreement   ☐ CCS Application
☐ MH/AODA Functional Screen Consent Form
☐ State MH/AODA Functional screen results page

GENERAL SERVICE AUTHORIZATION REQUESTS

☐ Authorization Tab (ProviderConnect) **These are requests for services w/in your Agency.**
☐ Service Authorization Request (Avatar) **These are requests for services other than your Agency.**

Community Based Services-Checklists

CSP Checklist

CONSENT REVIEW (Avatar)

Verify the following are on file:
- ☐ CRA
- ☐ Informed Consent for Disclosure of Client Information
- ☐ Consent to Services and Rights Acknowledgement

Verify any consents that are specific to your agency if not listed above.

INITIAL INTAKE FORMS/REPORTS FOR REVIEW (Avatar)

Review either the Form or Report
- ☐ CARS Referral Form/Report
- ☐ Client Contact Information/Report (Update if applicable)
- ☐ Emergency Contact (Update if applicable)
- ☐ Financial Investigation
- ☐ CARS Assessment Result and Placement/Report
- ☐ CARS Comprehensive Assessment/Report

Chart View-Client View Section
Review the following if the client was admitted to any of the BHD departments.
- ☐ Individual Progress Notes if applicable
- ☐ Crisis Discharge Summary Report if applicable (Emergency Dept)
- ☐ IP Patient Discharge Instructions Report if applicable
- ☐ Discharge Medications Report if applicable

OPEN THE CSP EPISODE (ProviderConnect)

- ☐ Provider Admission Tab

ASSESSMENT FORMS (Avatar)

- ☐ Print the CARS CSP Initial Assessment Report
- ☐ Print the CARS CSP Indepth Assessment Report
- ☐ CARS Comprehensive Assessment (Use the CARS CSP Initial Assessment Report)
- ☐ CARS Comprehensive Assessment (Use the CARS CSP Indepth Assessment Report)
- ☐ CARS Assessment Summary
- ☐ Crisis Plan if applicable
- ☐ PPS/NOMS Supplemental
- ☐ State of Wisconsin PPS AODA Module
- ☐ State of Wisconsin PPS Mental Health Module
- ☐ State of Wisconsin PPS General Information

BILLABLE & NON-BILLABLE SERVICES (ProviderConnect)

Enter billable, non-billable services and case notes.
- ☐ Treatment Tab

IRP (Avatar)

- ☐ Individual Recovery Plan

SERVICE AUTHORIZATIONS (ProviderConnect)

CSP requests units on 180 day basis
- ☐ Authorization Tab

PRIOR AUTHORIZATTION (ProviderConnect)

- ☐ Forward the paper PA to CARS when applicable

Community Based Services-Checklists

DOCUMENTS TO FILE ATTACH

- File attach documents as applicable.
- Documentation that **did not** occur in Avatar/ProviderConnect will need to be file attached as applicable. ie documents that the client has brought in w/them.

☐ ProviderConnect File Attach (Avatar)
☐ Authorization-Add New (ProviderConnect)

OTHER

☐ FAX demographic changes to CARS

Community Based Services-Checklists

RSC Checklist

CONSENTS

Verify the following are on file:

☐ CRA

Complete the following:

☐ SCCP consent (Paper)

Verify any consents that are specific to your agency if not listed above.

INITIAL INTAKE FORMS/REPORTS FOR REVIEW (Avatar)

Review either the Form or Report

☐ CARS Referral Form/Report

☐ Client Contact Information/Report (Update if applicable)

☐ Emergency Contact (Update if applicable)

☐ Financial Investigation

☐ CARS Assessment Result and Placement/Report

☐ CARS Comprehensive Assessment/Report

Chart View-Client View Section

Review the following if the client was admitted to any of the BHD departments.

☐ Individual Progress Notes if applicable

☐ Crisis Discharge Summary Report if applicable (Emergency Dept)

☐ IP Patient Discharge Instructions Report if applicable

☐ Discharge Medications Report if applicable

OPEN THE RSC EPISODE (ProviderConnect)

☐ Provider Admission Tab

ASSESSMENT FORMS (Avatar)

☐ Acuity Index

☐ Recovery Support Service Assessment

☐ Crisis Plan if applicable

☐ PPS/NOMS Supplemental   ☐ State of Wisconsin PPS AODA Module

☐ State of Wisconsin PPS General Information   ☐ State of Wisconsin PPS Mental Health Module

BILLABLE & NON-BILLABLE SERVICES (ProviderConnect)

Enter billable and non-billable services and case notes.

☐ Treatment Tab

IRP (Avatar)

☐ Individual Recovery Plan

SERVICE AUTHORIZATIONS

☐ Authorization Tab (ProviderConnect) **These are requests for services w/in your Agency.**

☐ Service Authorization Request (Avatar) **These are requests for services other than your Agency.**

DOCUMENTS TO FILE ATTACH (Avatar)

- Attach documents using ProviderConnect File Attach (Avatar). File attach documents as applicable.
- Documentation that **did not** occur in Avatar/ProviderConnect will need to be file attached as applicable. ie documents that the client has brought in w/them.

☐ SCCP consent

OTHER

☐ FAX demographic changes to CARS

TCM Checklist

CONSENT REVIEW (Avatar)

Verify the following are on file:
- ☐ CRA
- ☐ Informed Consent for Disclosure of Client Information
- ☐ Consent to Services and Rights Acknowledgement

Verify any consents that are specific to your agency if not listed above.

INITIAL INTAKE FORMS/REPORTS FOR REVIEW (Avatar)

Review either the Form or Report
- ☐ CARS Referral Form/Report
- ☐ Client Contact Information/Report (Update if applicable)
- ☐ Emergency Contact (Update if applicable)
- ☐ Financial Investigation
- ☐ CARS Assessment Result and Placement/Report
- ☐ CARS Comprehensive Assessment/Report

Chart View-Client View Section

Review the following if the client was admitted to any of the BHD departments.
- ☐ Individual Progress Notes if applicable
- ☐ Crisis Discharge Summary Report if applicable (Emergency Dept)
- ☐ IP Patient Discharge Instructions Report if applicable
- ☐ Discharge Medications Report if applicable

OPEN THE TCM EPISODE (ProviderConnect)

- ☐ Provider Admission Tab

ASSESSMENT FORMS (Avatar)

- ☐ CARS Comprehensive Assessment
- ☐ CARS Assessment Summary
- ☐ Crisis Plan if applicable
- ☐ PPS/NOMS Supplemental
- ☐ State of Wisconsin PPS AODA Module
- ☐ State of Wisconsin PPS Mental Health Module
- ☐ State of Wisconsin PPS General Information

BILLABLE & NON-BILLABLE SERVICES (ProviderConnect)

Enter billable and non-billable services and case notes.
- ☐ Treatment Tab

IRP (Avatar)

- ☐ Individual Recovery Plan (Complete after the CARS Assessment Summary)

SERVICE AUTHORIZATION (ProviderConnect)

Service Authorizations need to be entered for existing treatment services every 6 months.
- ☐ Authorization

Community Based Services-Checklists

DOCUMENTS TO FILE ATTACH

- File attach documents as applicable.
- Documentation that **did not** occur in Avatar/ProviderConnect will need to be file attached as applicable. ie documents that the client has brought in w/them.

☐ ProviderConnect File Attach (Avatar)
☐ Authorization-Add New (ProviderConnect)

PRIOR AUTHORIZATTION

☐ Forward the paper PA to CARS when applicable

OTHER

☐ FAX demographic changes to CARS

Community Based Services-Checklists